ADC Market Size Will Witness Robust Growth with Emerging Therapies by 2034 | DelveInsight

Companies working in the ADC market are Roche, Takeda, Gilead Sciences, Pfizer, GlaxoSmithKline, and others.

LAS VEGAS, NV, UNITED STATES, December 10, 2024 /EINPresswire.com/ -- The ADC market is projected to experience rapid growth due to the expansion of indications for already approved therapies, increased R&D activities. Additionally, the competitive landscape is relatively sparse and the regulatory pathway for approval will likely involve extensive clinical trials to demonstrate safety and efficacy.

DelveInsight's ADC Market Insights report includes a comprehensive understanding of current treatment practices, emerging ADC, market share of individual therapies, and current and forecasted ADC market size from 2020 to 2034, segmented into 7MM [the United States, the EU4 (Germany, France, Italy, and Spain), the United Kingdom, and Japan].

Key Takeaways from the ADC Market Report:

As per DelveInsight's analysis, the ADC market is anticipated to grow at a significant CAGR by 2034.
The U.S. FDA has approved a total of 13 antibody-drug conjugates (ADCs), with MYLOTARG being the first to gain approval. However, in 2017, MYLOTARG was voluntarily withdrawn from the market after confirmatory trials failed to demonstrate clinical benefit and raised safety concerns, including a high rate of early deaths.
The development of the ADC market is a global effort, with companies worldwide investing significant resources into this field. Currently, more than 200 ADCs are in various stages of preclinical and clinical development, highlighting the extensive interest and potential of this technology.
Several major players are actively developing ADCs across the 7MM (the seven major markets), with large-cap companies such as Roche, Takeda, Gilead Sciences, Pfizer, GlaxoSmithKline, and Daiichi Sankyo/AstraZeneca leading the charge. Daiichi Sankyo, in particular, is expected to drive a new era for ADCs.
At the ASCO 2024 conference, AbbVie presented new data from its innovative ADC platform, showcasing promising results across three different ADCs: ABBV-706, telisotuzumab vedotin, and ABBV-400, in the treatment of solid tumors.

In a late-breaking session at ASCO 2024, GSK shared significant findings from the DREAMM-8 study. This data is particularly noteworthy following GSK's decision to withdraw BLENREP from the U.S. market in late 2022. The new results could support a potential reintroduction of BLENREP, with regulatory decisions in the U.S., EU, and Japan for second-line and above multiple myeloma expected in 2025, based on the DREAMM-7/8 trials.

Discover which therapies are expected to grab the ADC market share @ ADC Market Report

Marketed Drugs in the ADC Inhibitors Market

ENHERTU (fam-trastuzumab deruxtecan-nxki): AstraZeneca/Daiichi Sankyo

ENHERTU is an antibody-drug conjugate (ADC) that targets HER2 and combines a topoisomerase inhibitor. It consists of three components: a humanized anti-HER2 IgG1 monoclonal antibody, covalently linked to a topoisomerase inhibitor via a tetrapeptide-based cleavable linker. The drug's active agent, deruxtecan, is a protease-cleavable maleimide tetrapeptide linker linked to DXd, a topoisomerase inhibitor derived from exatecan. ENHERTU is approved for the treatment of adult patients with unresectable or metastatic HER2-positive breast cancer who have previously received an anti-HER2-based regimen. It is also indicated for adult patients with unresectable or metastatic non-small cell lung cancer (NSCLC) with activating HER2 (ERBB2) mutations, among other indications.

In June 2024, AstraZeneca reported detailed positive results from the DESTINY-Breast06 Phase III trial, where ENHERTU demonstrated a statistically significant and clinically meaningful improvement in progression-free survival compared to standard chemotherapy in patients with HR-positive, HER2-low metastatic breast cancer, as well as in the overall trial population.

ADCETRIS (brentuximab vedotin): Pfizer (Seagen)/Takeda

ADCETRIS is an antibody-drug conjugate directed against CD30 and linked to a microtubule inhibitor. It consists of three components: a chimeric IgG1 antibody (cAC10) targeting human CD30, the microtubule-disrupting agent MMAE, and a protease-cleavable linker that covalently binds MMAE to cAC10. ADCETRIS is indicated for the treatment of adult patients with previously untreated Stage III or IV classical Hodgkin lymphoma (cHL) in combination with doxorubicin, vinblastine, and dacarbazine. It is also approved for adult patients with systemic anaplastic large cell lymphoma (sALCL) after failure of at least one prior chemotherapy regimen, as well as for patients with primary cutaneous anaplastic large cell lymphoma (pcALCL) or CD30-expressing mycosis fungoides (MF) who have previously undergone systemic therapy.

In June 2024, Pfizer announced detailed overall survival results from the Phase III ECHELON-3 study of ADCETRIS in combination with lenalidomide and rituximab for patients with

relapsed/refractory diffuse large B-cell lymphoma (DLBCL).

Telisotuzumab vedotin is an antibody-drug conjugate targeting cMet that is currently under investigation in a Phase III trial for the treatment of non-small cell lung cancer (NSCLC). In January 2022, AbbVie announced that the U.S. FDA granted Breakthrough Therapy Designation (BTD) to telisotuzumab vedotin for the treatment of patients with advanced or metastatic epidermal growth factor receptor (EGFR) wild-type, non-squamous NSCLC, who exhibit high levels of c-Met overexpression and whose disease has progressed following platinum-based therapy.

In November 2023, AbbVie released topline results from the single-arm Phase II LUMINOSITY trial, which evaluated telisotuzumab vedotin in patients with c-Met protein overexpression, EGFR wild-type, advanced or metastatic nonsquamous NSCLC.

Patritumab Deruxtecan (HER3-DXd): Daiichi Sankyo/Merck

Patritumab deruxtecan is an investigational HER3-directed antibody-drug conjugate. Developed using Daiichi Sankyo's proprietary DXd ADC technology, patritumab deruxtecan consists of a fully human anti-HER3 IgG1 monoclonal antibody linked to multiple topoisomerase I inhibitor payloads (DXd, an exatecan derivative) via cleavable tetrapeptide-based linkers. In December 2021, the U.S. FDA granted Breakthrough Therapy Designation (BTD) to patritumab deruxtecan for the treatment of patients with EGFR-mutated, locally advanced or metastatic NSCLC. The drug is currently being studied in both early- and late-stage clinical trials.

In October 2023, Daiichi Sankyo and Merck announced a global development and commercialization partnership for three of Daiichi Sankyo's DXd antibody-drug conjugate candidates: patritumab deruxtecan, ifinatamab deruxtecan (I-DXd), and raludotatug deruxtecan (R-DXd).

To know more about ADC clinical trials, visit @ ADC Treatment Drugs

ADC Overview

Antibody-drug conjugates (ADCs) represent a promising new class of highly potent pharmaceutical therapies that combine the benefits of chemotherapy and immunotherapy. ADCs enable the targeted delivery of powerful cytotoxic drugs directly to tumor cells, minimizing damage to healthy cells. This targeted approach overcomes one of the main challenges of traditional chemotherapy, offering a broader therapeutic window.

A critical factor in the development of ADCs for cancer treatment is the identification of a unique antigenic target for the monoclonal antibody component. This target must meet several criteria:

1. It should be highly expressed on tumor cells but absent or minimally present on healthy cells.

2. The antigen should be located on the surface of the tumor cell to ensure accessibility to the circulating monoclonal antibody.
3. The target antigen should have internalization capabilities, which allow the ADC to enter the cell, enhancing the delivery of the cytotoxic drug and improving the overall efficacy.

As of now, 13 antibody-drug conjugates have been approved by the U.S. FDA, including KADCYLA, ADCETRIS, BESPONSA, MYLOTARG, LUMOXITI, POLIVY, PADCEV, TRODELVY, ENHERTU, BLENREP, ZYNLONTA, TIVDAK, and ELAHERE.

Learn more about the FDA-approved ADC @ ADC Drugs

ADC Inhibitors Market Outlook

The use of antibody-drug conjugates (ADCs) is significantly transforming the treatment of solid tumors, particularly HER2-positive breast cancer. These treatments have been instrumental in delaying disease progression and extending survival in one of the most aggressive forms of the disease. The success of ADCs in HER2-positive breast cancer has sparked exploration into their use across various cancers expressing different tumor antigens. ENHERTU, for instance, has the potential to reshape the treatment landscape for multiple major cancer types.

As the ADC market expands and indications for drugs like ENHERTU grow, sales are steadily increasing. AstraZeneca and Daiichi Sankyo are presenting new data from the DESTINY-Breast06 trial at ASCO 2024, which may lead to ENHERTU being used earlier in treatment for HER2-low breast cancer, potentially even in patients with lower HER2 expression than the current threshold. TRODELVY, the first ADC to demonstrate an overall survival benefit, has also shown efficacy in HR+/HER2- breast cancer, the most common subtype. Advances in linker chemistry, antibody technology, and the use of potent cytotoxic agents have allowed for the targeting of tumors, regardless of antigen expression levels, broadening the scope of ADC treatment options. However, the use of these novel therapies is not without risks, as they are associated with unique toxicities, requiring vigilant patient monitoring.

The antibody-drug conjugate market is expected to evolve rapidly as companies around the world continue to invest heavily in development and expansion, aiming to treat a wide range of indications from 2024 to 2034. Currently, over 200 ADCs are in preclinical or clinical stages, signaling the onset of a new era in targeted cancer therapy. Roche currently leads the market, but Daiichi Sankyo is poised to play a pivotal role in advancing the next generation of ADC treatments.

In 2023, ENHERTU generated nearly USD 1.47 billion in sales in the U.S., while KADCYLA contributed around USD 760 million in U.S. sales during the same period. In February 2024, AbbVie finalized a USD 10.1 billion acquisition of ImmunoGen, securing ELAHERE, the only FDA-approved ADC for ovarian cancer, along with two promising ADC candidates in ImmunoGen's pipeline, pivekimab sunirine and IMGN-151. Additionally, in January 2024, RemeGen's RC88, a mesothelin-targeting ADC, received Fast Track Designation from the U.S. FDA for the potential treatment of platinum-resistant ovarian, fallopian tube, and primary peritoneal cancers. Also in January 2024, Debiopharm extended its exclusive licensing agreement with SunRock Biopharma to develop innovative ADCs, including a HER3-EGFR bispecific ADC using SunRock's Multilink technology.

Scope of the ADC Market Report
Study Period: 2020–2034
ADC Report Coverage: 7MM [The United States, EU5 (Germany, France, Italy, Spain, and the United Kingdom), and Japan]
Key ADC Companies:
Key ADC:
ADC Therapeutic Assessment: ADC current marketed and emerging therapies
ADC Market Dynamics: Conjoint Analysis of Emerging ADC Drugs
Competitive Intelligence Analysis: SWOT analysis and Market entry strategies
ADC Unmet Needs, KOL's views, Analyst's views, ADC Market Access and Reimbursement

Discover more about ADC drugs in development @ ADC Clinical Trials

https://www.delveinsight.com/sample-request/ADC-market-forecast?utm_source=einpresswire&utm_medium=pressrelease&utm_campaign=kpr

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About DelveInsight

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It also offers Healthcare Consulting Services, which benefits in market analysis to accelerate the business growth and overcome challenges with a practical approach.

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